predictio

The PI solution step-by-step

Table of Contents

Get started with the PI Solution

Dashboard – for an overview of all your current activities in the PI solution
When you log in, you will see your Dashboard. To get back to the Dashboard at any point, just click on the PI-logo or on Browse to the left on the top of the page and then choose Dashboard.

Top Menu bar to the right:

- **Send Assessments** if you quickly want to send an assessment
- **Create a new job** every time you recruit for a new position, add it here (recommended but not mandatory)
- **Search** field where you can search for assessments

Top menu bar to the right if you click on your name:

- **My Profile** To see your profile settings and change password
- **Administration** If you are an admin user you can find admin settings here
    - This is also where you activate GDPR settings

Top menu bar to the left:

Browse

- **Dashboard** Get an overview of all of your current activities in the PI platform
- **Assessment Center** send out Behavioral and Cognitive assessments
- **Folders** Access your assessments by folders or groups
- **Teams**
- **Employee Directory** See an overview of your employees in the PI platform
- **Analytics** Decode group drives and behaviors. Look at Group Analytics charts

Hire (recruit and promote externally and internally)

- **Create a new job & Set a Job Target** Every time you recruit for a new position, add the job here.
- **Assess & Review Candidates** Send assessments to candidates and select a job to see how well the candidates match with the job
- **Interview Candidates** Create interview guides – see fits and gaps
- **Onboard New Employees** Reports that will help you onboard new hires

Inspire (inspire and engage people in your organization)

- **Develop People** Helps you understand an employee's motivational drives

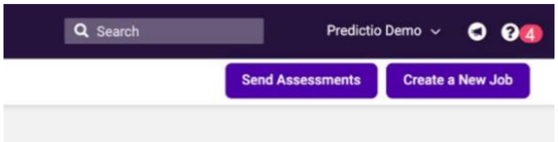
    - Create a Relationship Guide to enable better cooperation and download all individual reports
- **Develop Managers** Empower Managers to foster strong relationships
    - Create Manager Development Chart, Management Strategy Guide and Coaching Guide

- **Learn** The PI Knowledge bank

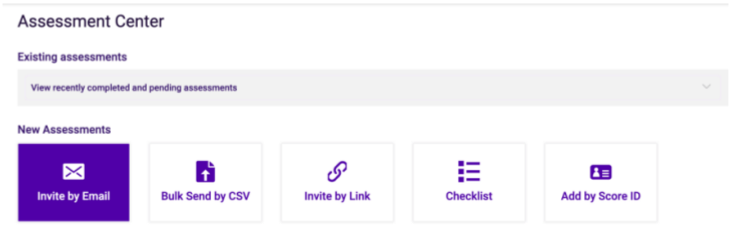
Send a PI assessment

Step by step guide on how to send a PI assessment

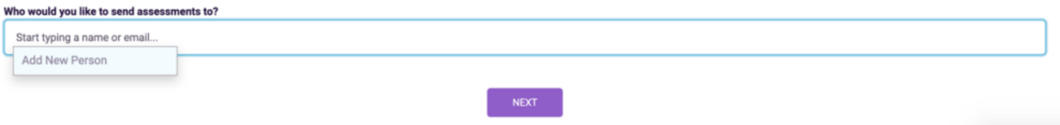
1. Go to your dashboard/home page in your PI account
2. Click on **Send Assessments** in the top right corner



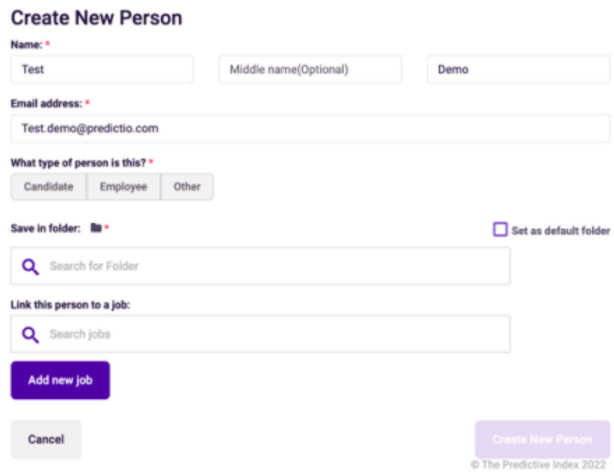
3. Select the option you prefer, **Invite by Email** is recommended.



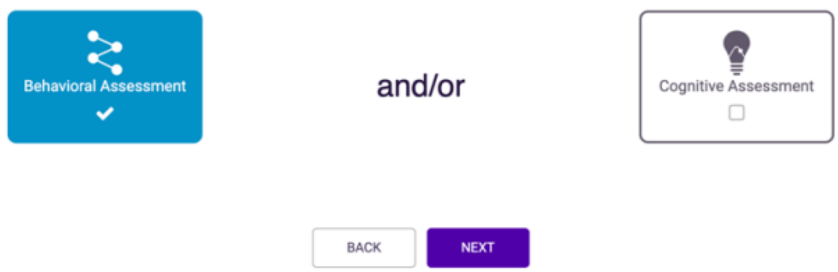
4. Write the assessment taker's name in the field **Who would you like to send assessments to?** If a new person, select the **Add New Person** option



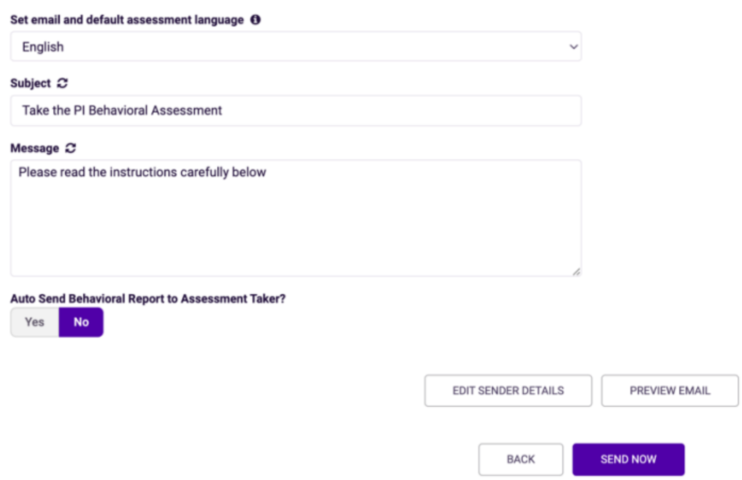
5. When you get to the next step you fill in name, email address, type of person and select the folder you want the person's PI-profile to be saved in. Here you can also link the person to a job.



6. Click on **Create New Person**
7. Then click on **NEXT**
8. Select which assessment(s) you would like to send



9. Select a language and a message (optional) to be sent with the assessment

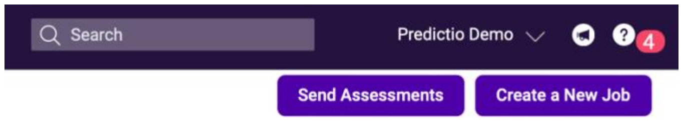


10. Click on **SEND NOW** (a green box will appear in the bottom right corner)

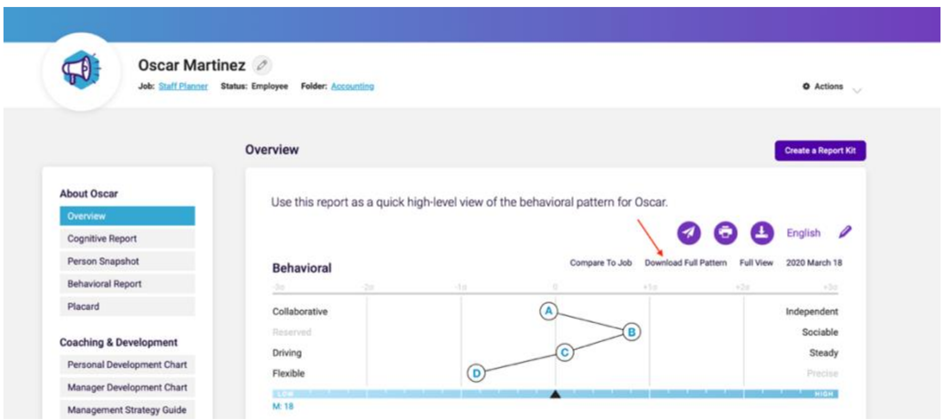
How to download a full PI-profile?

See below instructions on how you download a full PI-profile with self, self-concept and synthesis.

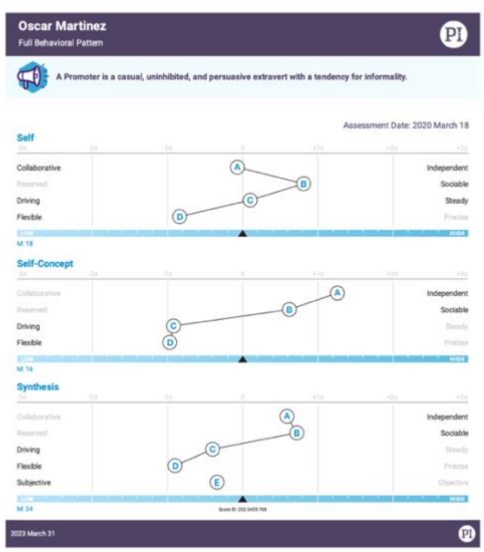
- Write the name of the person you wish to download the PI-profile of in the search bar in the top right corner of the PI-platform



- Click on the person's name
- Click on the heading **Download Full Pattern**



- You have now downloaded a full PI-profile



How to Set a Job Target

The Job Assessment helps you analyze each role and identify the underlying drives and cognitive ability required to be naturally motivated and successful in a specific role.

Create a job:

1. To create a new job in the software, click the '**Create a New Job**' button in the top right corner.
2. **Enter the job title**.
3. **Choose the folder** in which you'd like the position to be saved.
4. Then, select **Create Job.**

Set a job target:

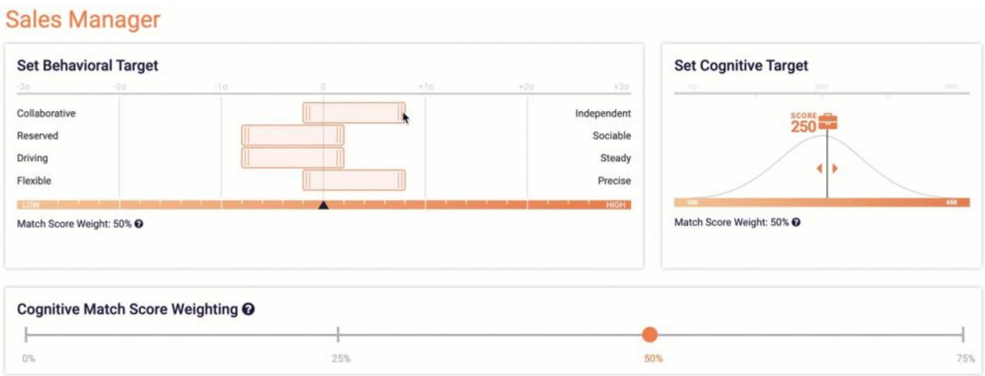
Now that you have created a job, you will be prompted to begin the Job Target process. There are two different ways to create a Job Target in the PI software, a guided Job Target Process and through Sending it to Stakeholders:

Guided Job Targeting Process

The Guided Job Targeting Process walks you through behavioral and cognitive questions of the Job Assessment. Once the Job Assessment is completed, the PI software provides recommended Behavioral and Cognitive Targets that can be accepted or modified.

1. **Complete the Guided Job Targeting process** by gathering your hiring team to complete it together. You will first click through the behavioral questions and then the cognitive section.
2. Once complete, you'll be brought to the Job Overview page. If you want to continue to edit your target, click '**Modify Target**'.

3. **Click and drag** the behavioral target, cognitive score, and cognitive match score only if adjustments are needed



4. Click '**Accept Target**' when complete.

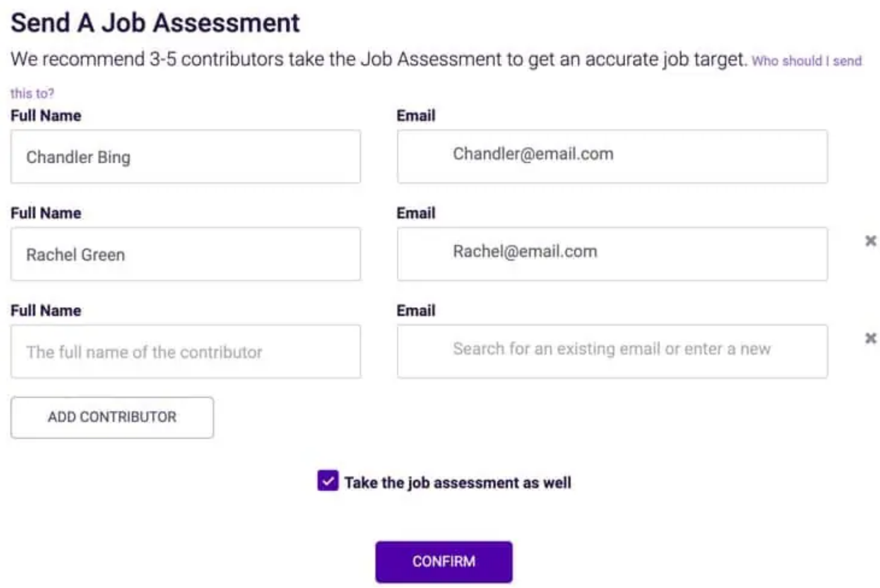
Send to Stakeholders

This option allows you to invite key stakeholders who have strong knowledge of the job requirements to participate in the Job Assessment. Stakeholders will receive an email with a link to complete the job assessment via the Guided Job Targeting process. You'll be able to review which responses to include in the final job pattern.

1. You have the option to leverage the targets of existing employees that are high performers (role models) and select to use their profile as input to set the job target. You can select as many role models as you'd like to get a benchmark. This feature can be used with or without requesting input from additional stakeholders. If you have any current employees who excel at the role you are generating a target for, you can add their profiles for input under the '**Pick a Role Model**' section.

2. To email the job assessment to stakeholders, **fill in their full name and email address**.

3. Check off the box that says 'Take the job assessment as well' if you want to complete the job assessment when you finish sending the assessments.



NOTE: Software access is not required to participate in the Job Assessment.

4. **Click Confirm** to send the assessments out.
5. Once all stakeholders have submitted their input, click into the job and click '**Set Job Target**' and you can edit and save the final target for the job based on the feedback from the team.

NOTE: Once an assessment has been emailed, you can't delete the stakeholder – you can only disable their results.

Guide PI Reports

Here is an overview over relevant PI Reports.

Overview – Pattern Insights

Use the insights as a base for analysing a pattern or when you are giving PI-feedback. Follow the structure of the overview by discussing the needs and behaviours, and then connect them with the factor combinations.

PI Behavioral Report

The most extensive and detailed report in the platform. A great report to get more insight into a person, however, it may be a little black and white. Therefore, you should discuss the report with the assessment taker, to really understand what resonates with them.

PI Placard

This is the simplest report in the platform and is a great base for starting conversations between co-workers on how to interact.

Personal Development Chart

A more generic report covering strengths, caution areas, and self-coaching tips to increase self-awareness. Use in on-boarding and development conversations. Read it together (manager & employee) and discuss which areas both parties resonate most with and what support the employee needs in their development within those areas.

Manager Development Chart

Same as Personal Development Chart, with a narrative directed to leaders.

Management Strategy Guide

This guide help managers motivate, and lead employees based on their needs. Read through the 12 strategies listed and discuss how the employee resonates with them. A recommendation is to agree on three of the strategies to focus on.

Relationship Guide

This guide is used to compare two people's profiles to discover how they work together. It provides strengths, caution areas, and tips. Use between manager and employee, team members, or colleagues to discuss future collaboration or as a base to resolve current conflicts.

Coaching Guide*

A guide that plots a person's pattern against their job target to provide coaching questions. Helpful in development conversations and when giving constructive feedback.

Interview Guide*

Tailored investigative interview questions based on candidates' fits and gaps to the requirements of the role.

The Coaching Guide and Interview guide are only available if the person is connected to a job

The PI Solution – how to guides

Get started

- Virtual Onboarding Sessions & Software Guides: https://www.predictiveindex.com/learn/support/virtual-onboarding-sessions-software-guides/

Assessment and job targets

- Create and manage job targets: https://www.predictiveindex.com/learn/support/create-and-manage-job-targets/
- Assessment Center – Behavioral and Cognitive Assessments: https://www.predictiveindex.com/learn/support/assessment-center-behavioral-and-cognitive-assessments/
- Job Assessments overview: https://piworldwide.wistia.com/medias/w4x43ltaxp
- Reasons You Can't Locate an Assessment: https://www.predictiveindex.com/learn/support/reasons-you-cant-locate-an-assessment/
- Managing multiple behavioral assessments for one person: https://www.predictiveindex.com/learn/support/managing-multiple-behavioral-assessments-for-one-person/
- Delete a Behavioral or Cognitive Assessment: https://www.predictiveindex.com/learn/support/delete-a-behavioral-or-cognitive-assessment/

Introduce PI to your colleagues

- Explain PI to your organization: https://www.predictiveindex.com/learn/support/explain-pi-to-your-organization/
- Understanding behavior: https://www.predictiveindex.com/learn/support/client-presentation-understanding-behavior/

Person page and reports/guides

- Person page review: https://www.predictiveindex.com/learn/support/person-page-review/
- Behavioral report overview: https://www.predictiveindex.com/learn/support/behavioral-report-overview/
- Interview Guide: https://www.predictiveindex.com/learn/support/generate-an-interview-guide/

Teams and team functionality

- Teams: https://www.predictiveindex.com/learn/support/teams/
- Teams and Team Discovery: https://www.predictiveindex.com/learn/support/teams-and-team-discovery/
- Analytics walkthrough: https://www.predictiveindex.com/learn/support/group-analytics/

Tips and insights

- Prepare for a Readback: https://www.predictiveindex.com/learn/support/prepare-for-a-readback/
- Reference Profiles: https://www.predictiveindex.com/learn/support/introduction-to-reference-profiles/

Technical recommendations and troubleshooting

- Troubleshooting guide: https://www.predictiveindex.com/learn/support/troubleshooting-guide/
- PI Software Technical Recommendations: https://www.predictiveindex.com/learn/support/pi-software-technical-recommendations/